Process	*Modifying Organizations*
Process Number	*GL – 038*

Description of Process

Modify an existing organization. Organizations can be modified if there is a change in some of the descriptive characteristics, such as description or manager name. Organization values represent any divisional breakdown of an entity into operating units such as different bureaus in a state government. In combination with other ChartField values, they form the basis for organization budgets that track expenditures and revenues. The State of Georgia will create Organization values at the Business Unit SetID level, which will include Activities as well as true Organizations.

Input to Process

Organization Change Request is written up, signed, assigned an identifier and approved. The organization is then modified in PeopleSoft.

Output of Process

Existing organization is modified and is accessible to all business units having access to the SetID under which the organization was created.

Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Use	Organization

## Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Complete request form to modify an existing organization Using the forms provided to you, submit your request to the individual authorized to approve organization changes, usually someone at a supervisory level. If valid, the request will be input at the agency level. Otherwise, the request will be returned to you for corrective action or with an explanation for the denial of the request.	Agency
Step 2: Open the organization you wish to modify Using Update/Display mode, enter the SetID and Organization Code for the organization you wish to modify.	Agency
Step 3: Insert a row that will contain the organization modifications Insert a row using F7 in any effective dated field. This allows you to make *effective dated* changes and enables you to retain a history of the modifications made to the organization. Any modifications will take effect as of the date specified. In the row you just inserted, enter the Effective Date and Status for your organization. The Effective Date can be set to the current date or a future date and determines the date on which the change will go into effect. The Status refers to the availability of the organization for use in journal processing. The default Status is "Active."	Agency
Step 4: Make changes as requested on form	Agency
Step 5: Save the organization The organization is now saved with your changes and will be accessible to all users with access to the SetID under which the organization was created. The changes will take effect based on the effective date and status information provided in Step 4.	Agency
Step 6: Update the appropriate trees, as necessary.	Centralized
Step 7: Notify the requestor that the organization has been modified Send notification to the requestor that the organization has been modified and is available for use. The following are acceptable forms of notification: • E-mail • Facsimile • Interoffice Memorandum	Centralized

Forms Used with Process (#)

**Attach sample form(s) Organization Change Request.doc

Process Flow Diagram (if appropriate):
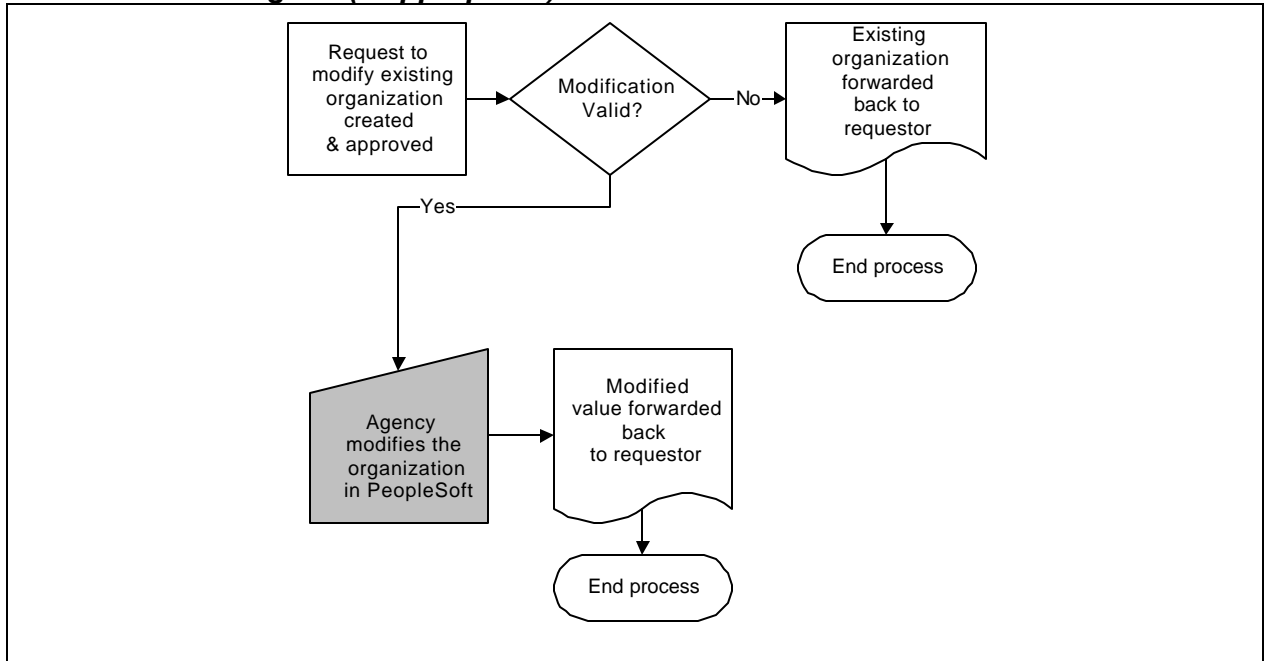
Process Signoff

Tested By
Date Tested